



USDA Foreign Agricultural Service

# GAIN Report

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## Spain

## Strawberries

## Annual

## 2006

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**Report Highlights:**

Spanish calendar year (CY) 2007 fresh and frozen strawberry exports will likely be down from CY 2006, assuming an average production year, in contrast to the production during CY 2006, which was the highest production CY 2000. (LR8SH1)

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Includes PSD Changes: Yes  
Includes Trade Matrix: Yes  
Unscheduled Report  
Madrid [SP1]  
[SP]

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## Executive Summary

- We expect Spanish CY 2007 fresh strawberry exports at 200,000 Metric Tons (MT), down from an estimated 217,000 MT during CY 2006. This forecast is based on the assumption of average per hectare production for CY 2007.
- We expect Spanish frozen strawberry exports to reach 15,500 MT in CY 2007, down from 19,700 MT in CY 2006, because frozen strawberry use in further processing continues to grow.
- About 90 percent of Spanish fresh strawberry production comes from the Southern *Andalucia* Community, where some 95 percent of that total is concentrated in the *Huelva* province. Dominant varieties cultivated are the *Reina de los valles*, the *Camarosa*, *Tudia*, *Oso grande*, *Cartuno* and *Carisma*. The bulk of production comes from greenhouses and tunnels. While hydroponic production is just beginning here, we expect it to expand in the coming years.
- The strawberry sector benefits from economic support under the EU fruit and vegetables Common Market Organization (CMO). Under this CMO, organized Producer Organizations have access to EU and national co-financing funds for building/improving handling and processing plants, and product marketing.
- The revision of the EU fruit and vegetables CMO, scheduled for the second half in CY 2006, should have minimal effect on the Spanish strawberry sector, because the sector does not benefit from direct income subsidies. Nevertheless, the review could result in a change in the amount and/or use of operational funds.

## Fresh Strawberries

## Production, Supply &amp; Distribution Table

## PSD Table

Country Spain

Commodity Strawberries, Fresh

(HA)(MT)

	2004	Revised		2005	Estimate		2006	Forecast	
	USDA	Post	Post	USDA	Post	Post	USDA	Post	Post
	Official	Estimate	Estimate	Official	Estimate	Estimate	Official	Estimate	Estimate
			New			New			New
Market Year	01-2005			01-2006			01-2007		
Begin									
Area Planted	7,700	7,700	7,611	7,800	7,800	7,678	0	0	8,058
Area Harvested	7,700	7,700	7,611	7,800	7,800	7,678	0	0	8,058
Production	308,600	308,600	308,000	295,000	295,000	333,500	0	0	306,400
Imports	6,305	6,000	6,136	8,000	8,000	5,000	0	0	8,000
Total Supply	314,905	314,600	314,136	303,000	303,000	338,500	0	0	314,400
Exports, Fresh	216,601	230,000	215,274	217,000	217,000	217,000	0	0	200,000
Fresh Dom.	37,000	37,000	37,000	36,000	36,000	40,000	0	0	36,000
Consumption									
For Processing	61,304	47,600	61,862	50,000	50,000	81,500	0	0	78,400
Total Distribution	314,905	314,600	314,136	303,000	303,000	338,500	0	0	314,400

## Production

MARKET YEAR	2000	2001	2002	2003	2004	2005	2006	2007
Area (HA)	11,100	9,800	8,900	9,100	7,558	7,611	7,678	8,058
Prod. (MT)	344,800	315,100	278,700	264,200	288,100	308,000	333,500	306,400
Average Yield (Mt/Ha)	31.1	32.2	31.3	29.0	38.1	40.5	43.4	38.0

Source: MAPYA up till 2006. We have forecasted 2007 data.

Data 2000-2003: [http://www.mapa.es/estadistica/Anu\\_04/pdf/PDF11\\_43.pdf](http://www.mapa.es/estadistica/Anu_04/pdf/PDF11_43.pdf)Data 2004-2006: [http://www.mapa.es/estadistica/pags/superficie/pdf/Avances\\_Cultivos\\_2006\\_08.pdf](http://www.mapa.es/estadistica/pags/superficie/pdf/Avances_Cultivos_2006_08.pdf)

## Trade

## General

Spain: Fresh Strawberry Imports

CY:	2000	2001	2002	2003	2004	2005	2006	2007
EU	3,330	2,411	5,165	6,337	4,848	3,251	3,700	6,000
Non-EU	1,010	1,002	1,329	953	2,969	2,885	1,300	2,000
TOTAL	4,340	3,413	6,494	7,290	7,927	6,136	5,000	8,000

Source: Global Trade Atlas (GTA) up till CY-2004. FAS Office estimates for CY-2005 and CY-2006.

Spain: Fresh Strawberry Exports

CY:	2000	2001	2002	2003	2004	2005	2006	2007
EU	202,641	222,340	214,895	217,465	247,048	210,730	213,000	196,000
Non-EU	4,060	2,779	1,625	2,649	4,069	4,544	4,000	4,000
TOTAL	206,701	225,119	216,520	220,114	251,115	215,274	217,000	200,000

Source: Global Trade Atlas (GTA) up till CY-2004. FAS Office estimates for CY-2005 and CY-2006.

## Trade Matrices

## Import Trade Matrix

Country

Spain

Commodity

Strawberries, Fresh

Time Period

Jan-Dec

Units:

Metric Tons

Imports for:

2005

2006

U.S.

U.S.

Others

Others

Portugal	1,273	Portugal	600
France	894	France	400
Italy	470	Other EU	300
Belgium	287	Morocco	3,700
Other EU-25	327		
Morocco	2,631		
Peru	195		

Total for Others

6,077

5,000

Others not Listed

59

0

Grand Total

6,136

5,000

# Export Trade Matrix

**Country**

Spain

**Commodity**

Strawberries, Fresh

Time Period

Jan- Dec

Units:

Metric Tons

Exports for:

2005

2006

U.S.

U.S.

Others

Others

France	78,963	France	75,500
Germany	55,202	Germany	55,600
U.K.	18,807	Italy	23,200
Italy	15,352	U.K.	20,500
Belgium	10,810	Belgium	8,200
Portugal	8,858	Portugal	8,200
Netherlands	7,087	Other EU- 25	21,800
Other EU- 25	15,651	Russia	700
Switzerland	2,841	Croatia	600
		Norway	400
Total for Others	213,571		214,700
Others not Listed	1,703		2,300
Grand Total	215,274		217,000

## Frozen Strawberries

## Production, Supply &amp; Distribution Table

## PSD Table

Country Spain

Commodity Strawberries, Frozen

(MT)

Market Year Begin	2004 Revised			2005 Estimate			2006 Forecast		
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New
	01-2005			01-2006			01-2007		
Deliv. To Processors	47,600	47,600	61,862	50,000	50,000	81,500	0	0	78,400
Beginning Stocks	0	0	0	0	0	0	0	0	0
Production	38,000	38,000	49,400	40,000	40,000	65,000	0	0	62,500
Imports	15,098	14,000	15,099	12,000	12,000	15,100	0	0	18,000
Total Supply	53,098	52,000	64,499	52,000	52,000	80,100	0	0	80,500
Exports	21,998	32,000	21,914	20,600	30,000	19,700	0	0	15,500
Domestic Consumption	31,100	20,000	42,585	31,400	22,000	60,400	0	0	65,000
Ending Stocks	0	0	0	0	0	0	0	0	0
Total Distribution	53,098	52,000	64,499	52,000	52,000	80,100	0	0	80,500

## Trade

## General

## Spain: Frozen Strawberry Imports

CY:	2000	2001	2002	2003	2004	2005	2006	2007
EU	451	441	753	439	769	1,129	1,300	1,500
Non-EU	7,257	6,910	10,517	12,577	21,536	13,902	13,800	16,500
TOTAL	7,708	7,351	11,270	13,016	22,304	15,099	15,100	18,000

Source: Global Trade Atlas (GTA) up till CY-2005. FAS Office estimates for CY-2006 and CY-2007.

## Spain: Frozen Strawberry Exports

CY:	2000	2001	2002	2003	2004	2005	2006	2007
EU	22,861	21,699	23,148	30,313	32,942	20,750	17,900	14,000
Non-EU	1,155	1,557	2,213	2,813	1,948	1,164	1,800	1500
TOTAL	24,016	23,256	25,271	33,126	34,890	21,914	19,700	15,500

Source: Global Trade Atlas (GTA) up till CY-2005. FAS Office estimates for CY-2006 and CY-2007.

## Trade Matrices

# Import Trade Matrix

Country

Spain

Commodity

Strawberries, Frozen

Time Period

Jan-Dec

Units:

Metric Tons

Imports for:

2005

2006

U.S.

U.S.

Others

Others

France	452	Belgium	300
Belgium	372	Poland	300
Other EU-25	373	France	200
Morocco	13,343	Other EU-25	500
		Morocco	13,800
Total for Others	14,540		15,100
Others not Listed	559		0
Grand Total	15,099		15,100

# Export Trade Matrix

Country

Spain

Commodity

Strawberries, Frozen

Time Period

Jan-Dec

Units:

Metric Tons

Exports for:

2005

2006

U.S.

U.S.

Others

Others

Netherlands	7,209	Netherlands	9,000
France	4,961	Germany	3,700
Germany	2,760	France	2,600
Portugal	809	U.K.	1,100
U.K.	720	Other EU-25	1,500
Other EU-25	4,291	Switzerland	1,100
Switzerland	448	Kuwait	300
Total for Others	21,198		19,300
Others not Listed	677		300
Grand Total	21,914		19,700